ACUMATICA BOT

CREATE EVENTS FROM EXCEL INPUT

Content

OVERVIEW

This how to guide introduces the *Acumatica Bot - Create Events from Excel INPUT*. Instead of spending precious time and resources on repetitive, manual tasks, let Automate go to work and streamline your IT and business processes with robotic process automation. With the help of Automate, bots take over manual steps which greatly reduces the repetitive activities and improves the quality and consistency of the work. The top processes being automated are report generation, file movement, data import and export, and scheduling batch processing.

The *Acumatica Bot - Create Events from Excel INPUT* is based in the **Acumatica Contract-Based REST API**. It creates Events in Acumatica by executing the "*Event*" HTTP method and update the Input Excel file with the result of the execution. This bot uses the simple Login to the Service method for authentication (username and password), the events will be created for this specified user. Check carefully the PREREQUISITES and the HOW TO GENERATE THE INPUT FILE sections to get detailed information.

PREREQUISITES

- **Automate:** The Acumatica Bot depends on Automate software in order to work. The minimum supported versions are:

    o Automate Ultimate 11.2

    o Automate Plus 11.2

    o Automate Desktop 11.2

- **Automate Markup Language file (.AML):** The primary file type used in Automate which contains the steps of our Acumatica Bot task

- **Acumatica:** Our minimal requirements are

    o **Acumatica Contract-Based API:** If not already installed you should install Acumatica ERP Configuration Wizard and a create new Acumatica ERP website to be able to use Contract-Based API. Contract-based APIs are built on an object model that the web services API provides.

    o **Acumatica account with proper permissions:** In order to be able to create Acumatica Events from an Automate Bot, you will need to create a new account or use an existing one with proper creation permissions to the **"Time and Expenses"** module. If you don't have an administration role, you can ask your Acumatica administrator.

    o **Acumatica API Version:** This bot was created using the "**18.200.001**" version, you should have this version available in your system.

- **Automate constants to be created to set the Acumatica connection values:**

    o **const_AcumaticaURL:** The Acumatica URL for your domain and the Acumatica ERP instance.

    Example: *http://localhost/AcumaticaDB*

    o **const_AcumaticaCompany:** The Acumatica company ID to wish the logon will be made.

    o **const_AcumaticaLocale:** The locale language to be used. Example: "*en-US*"

    o **const_AcumaticaUserName:** Acumatica Username for logon.

   o **const_AcumaticaPassword:** Acumatica user Password for logon.

HOW TO IMPORT AN AUTOMATE TASK

Compatible file types can be imported to the repository via drag-and-drop

From the Server Management Console, navigate to the Repository section

Drag the desired file(s) from its original location and drop them into the folder in the SMC. Files can be dropped into the folder icon or the main panel (as shown below). Imported object(s) are automatically placed into their corresponding repository location.
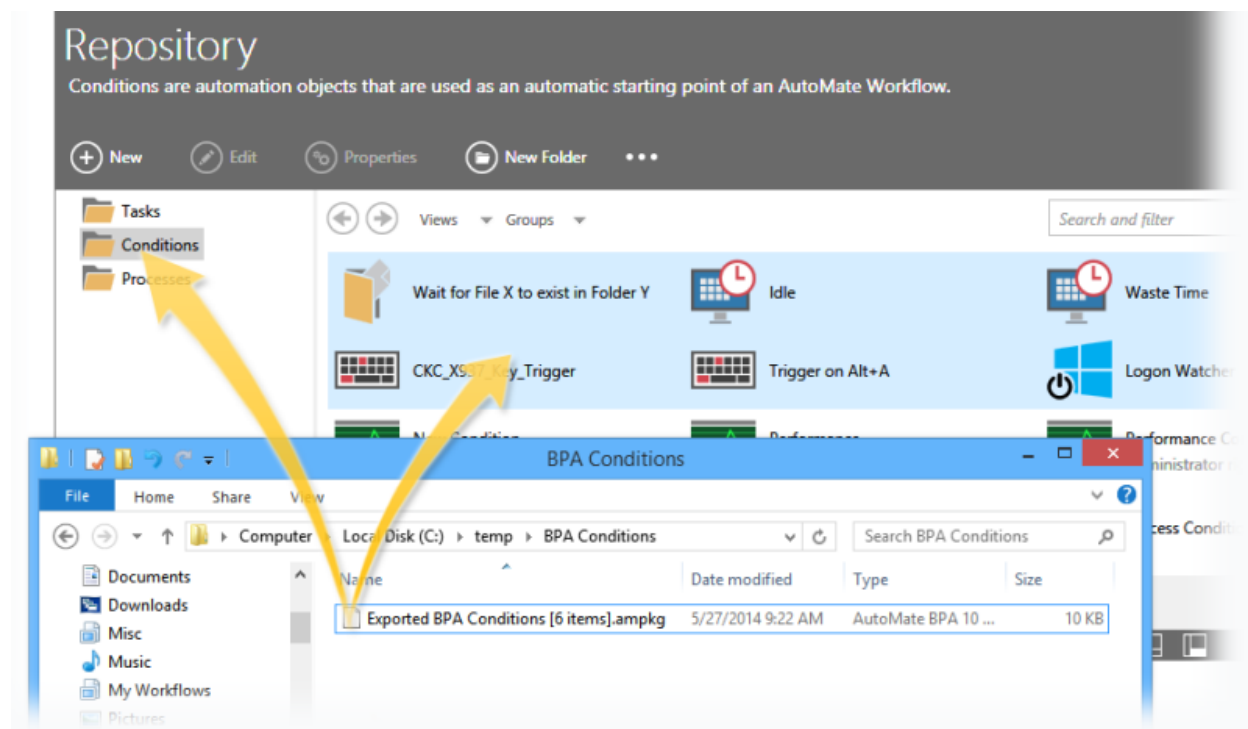
HOW TO GENERATE THE INPUT FILE

The input file *"Acumatica Create Events INPUT.xlsx"* shipped with the Acumatica Bot provides a self-explanatory guide to complete all the fields in your transaction automatically.

The Acumatica create Event screen:

The Excel INPUT file

Summary	Status	AllDay (X or Blank)	Internal (X or Blank)	Location	Priority	StartDateTime dd-mm-YYYYTHH:mm:ss Example: 15/05/2020T11:00:00	EndDateTime dd-mm-YYYYTHH:mm:ss Example: 15/05/2020T11:00:00	Body Text or HTML format	Attendees

Created?	Result Details	
Yes/No	Date	Event ID / Result Message

NOTES:

- *Red fields* are mandatory.

- Pay attention to the formats described in red.

- Columns K to M in the INPUT file will be filled with the result of the execution, the Event ID. See APPENDIX A for an example on the resulting.

HOW TO EXECUTE THE ACUMATICA BOT - CREATE EVENTS FROM EXCEL INPUT

If this is the first time running this task, we will need to set some parameters

Open the Server Management Console and locate the imported task

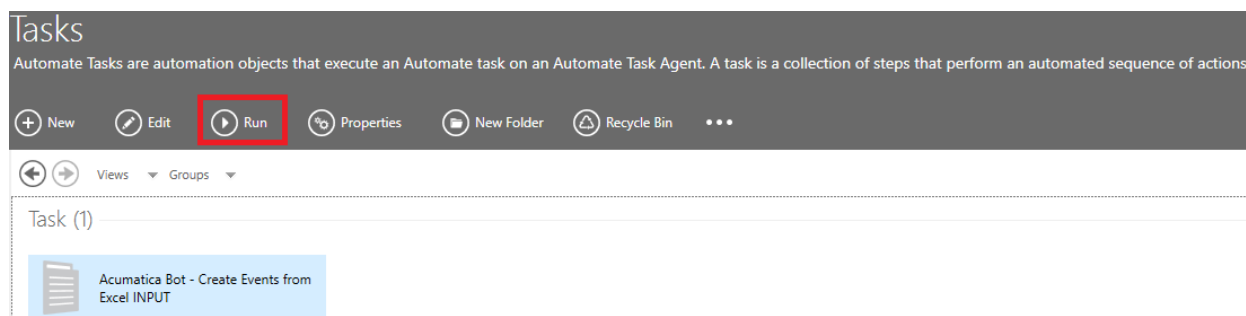Edit the imported task by right clicking on the task and selecting edit
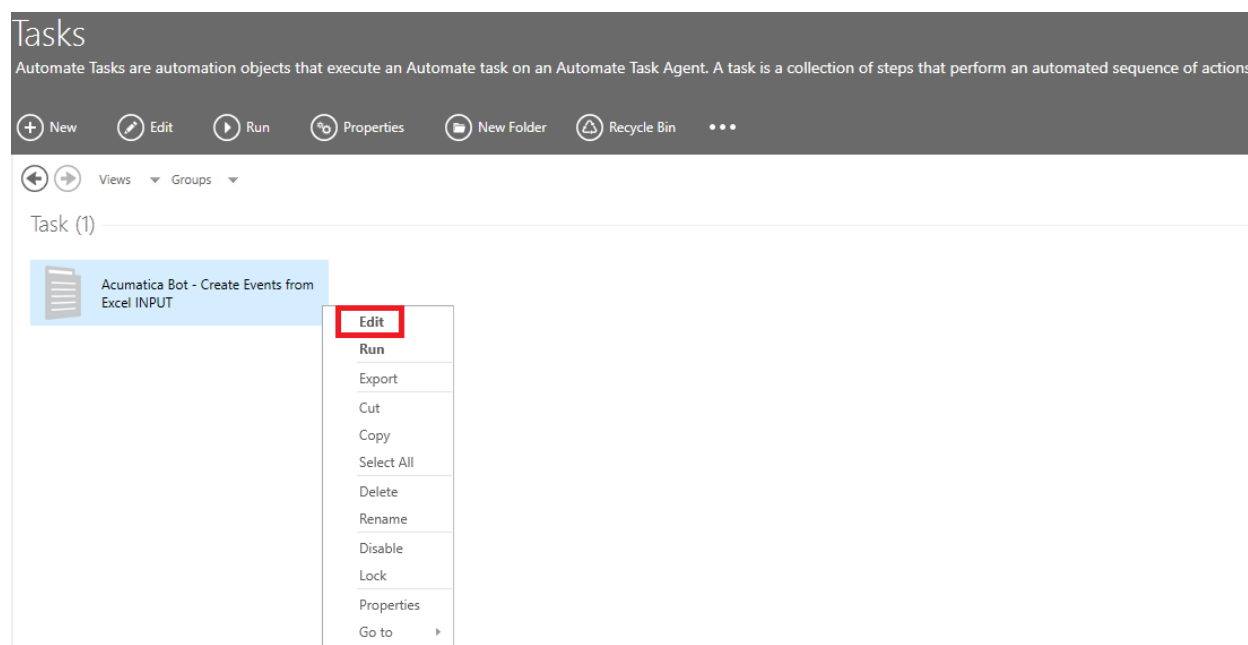
From step 2 edit the next variables according to your desired output:

- var_ExcelInputFile: The complete path and filename of the Acumatica Create Events INPUT.xlsx.

  Example: **"D:\Automate\ Acumatica Create Events INPUT.xlsx"**

Save and close the task

Select the task and click on Run

Select your Agent and click on Run again
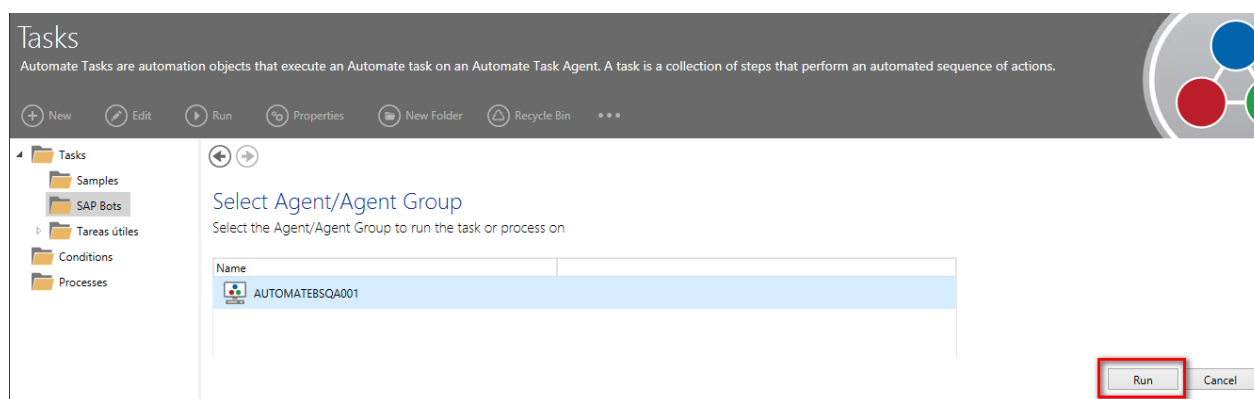
APPENDIX A – EXCEL OUTPUT AND ACUMATICA EVENTS VIEW EXAMPLE

INPUT Excel file with results:

Note that the execution result is written from column K to M. Column K will have the Event ID created in Acumatica.

Acumatica Events view result:

- Logs: Each iteration of our bot creates a log file for troubleshooting. You can locate the log file under C:\Automate\Tasks\<<TASK NAME>>. By Default, the task name is *Acumatica Bot - Create Events from Excel INPUT.*